



California
DEPARTMENT OF TECHNOLOGY



California
Department of Child Support Services

The Project Academy Series:

Project Transitions: People, Process and Technology

■ Feb 22nd and 26th, 2016



State of California
FRANCHISE TAX BOARD



Welcome and Introductions

Anthony Blue:

Branch Chief, IT Infrastructure, DCSS

Catherine Lanzaro:

Branch Chief, IT Applications, DCSS

Suzie McBride:

Section Manager, Enterprise Operational Data, FTB



Agenda

- Objectives
- CCSAS Project Background
- Business Process / Operational Transitions
- Staff Transitions
- Technology Transitions
- Measures for Success
- Questions





Objectives

- Learn the Three Types of Transitions
 - Business Process / Operational Transitions
 - Staff Transitions
 - Technology Transitions
- Understand Transition Tools
- Learn How to Measure Success



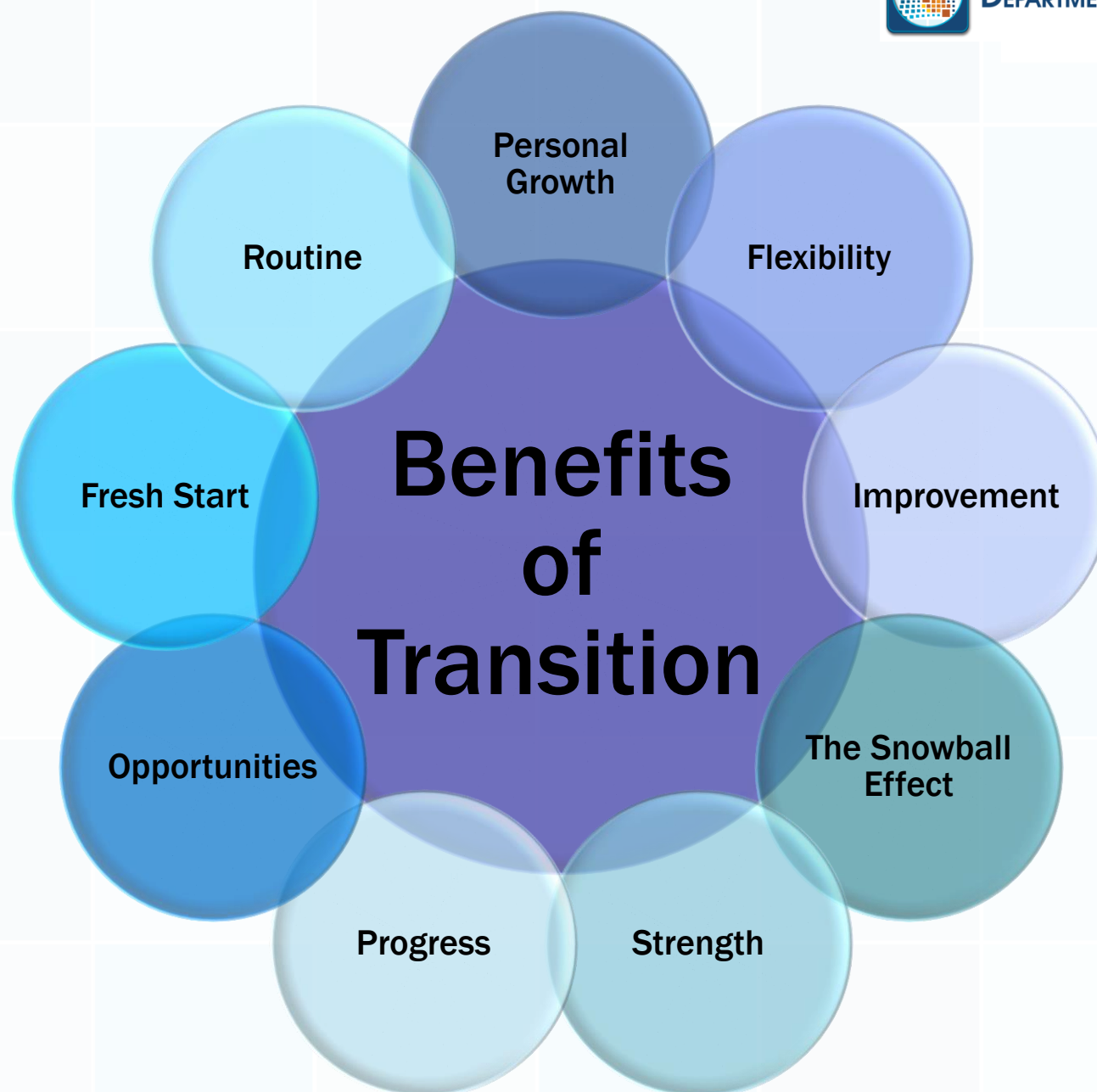


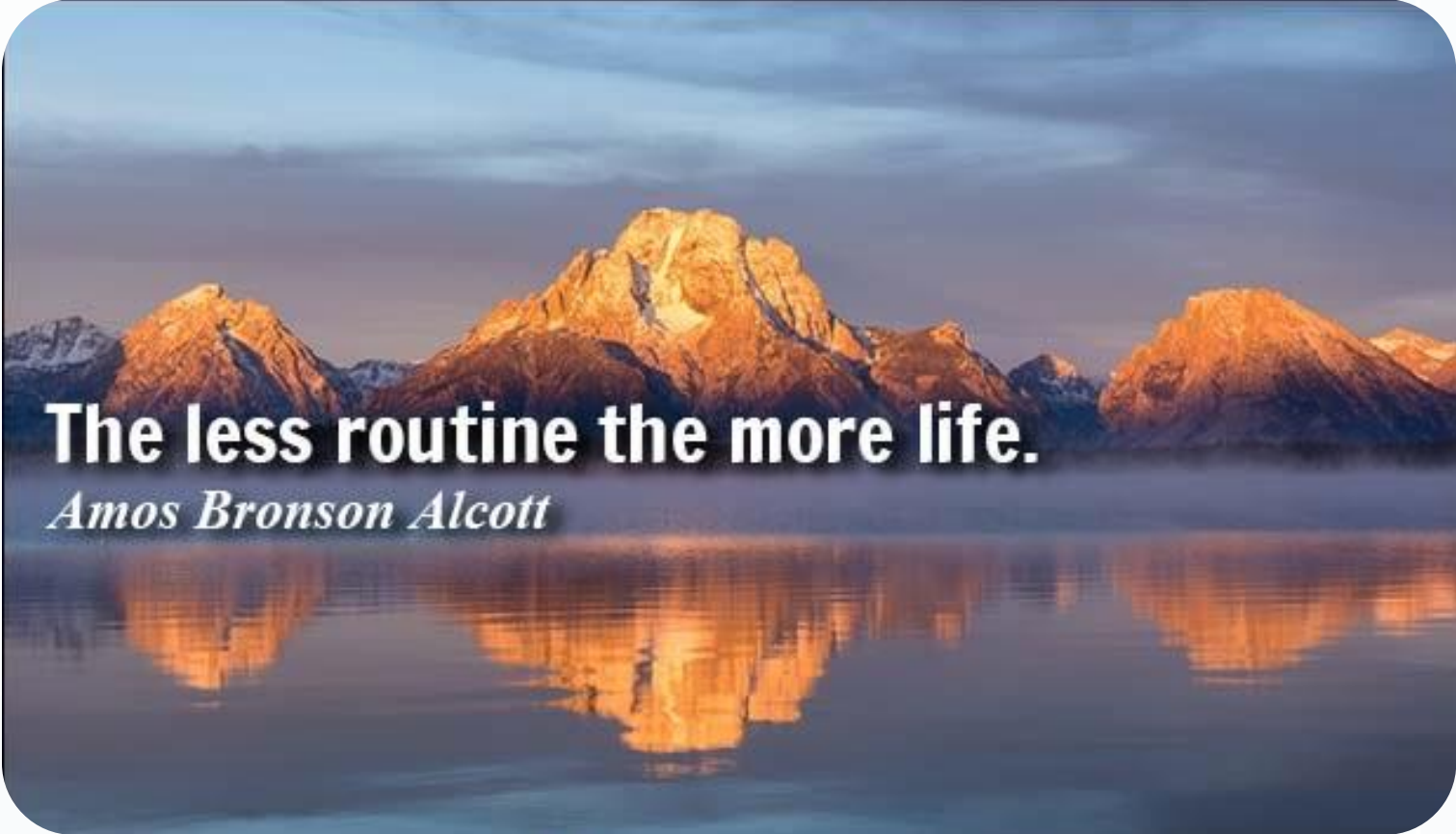
Transition Ice Breaker



Venture outside your comfort zone.
The rewards are worth it!

- Rapunzel, Tangled





The less routine the more life.

Amos Bronson Alcott



CCSAS Project Background

- California Child Support Automation System (CCSAS)
- Transition Activities/Approach
 - Managing the Transition
 - Business Process / Operational Transitions
 - Transition Planning
 - Staff Transitions
 - Technology Transitions



Managing the Transition

- Define Your Team
- Ensure Any Sub-Teams Are Chartered
- Manage Communications
 - Stakeholder
 - External Interactions
 - Internal
- Quality Management
- Change Control
- Risks
- Issues
- Transition In / Out





Transition: Are you In or Out?

- Every Transition Has Two Primary Efforts
 - 'Transition Out' which is the turning over of an already built system, artifacts, and responsibilities
 - 'Transition In' which is the definition and implementation of ongoing/future systems, artifacts, and responsibilities





Transition: In or Out? (cont.)

- The 'Transition Out' effort consists of itemizing and making available the requested 'as is' application code, hardware products, software products, tools, data, and documentation
- The 'Transition In' effort is comprised of evaluating the 'as is' artifacts and then defining and implementing the 'to be' system



Business Process / Operational Transitions

■ Transition Planning

- Business Processes
- Objectives
- Transitioned Services

■ Helpdesk

- End User Support
- Visual





Transition Planning: Business Processes

Account Management
Problem Management (Operations)
Change Management (Operations)
Recovery Management
On-line/Batch Processing Management
Performance and Capacity Management
Operations Monitoring
Help Desk Management
Security Management
Service Level Management
CSE and ECSS Production Support
Change Management (CCSAS)
System Configuration Management
Application Development/Testing
Requirements Management
Systems Management
(Database Support, Environments Architecture)
Performance and Capacity Management
Knowledge Management
Problem Resolution Management
Disaster Recovery





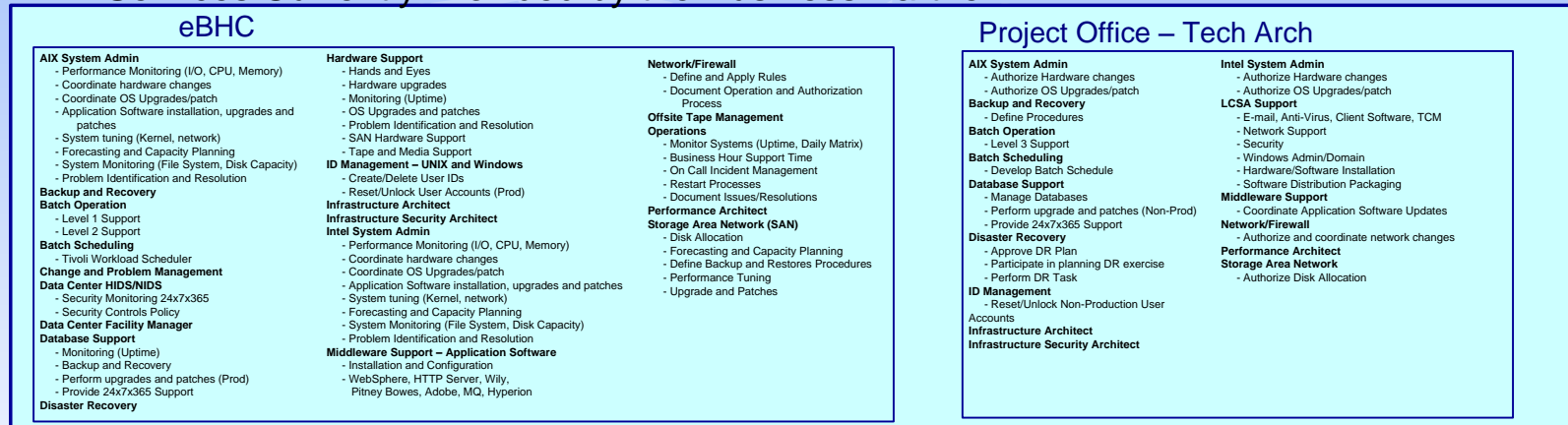
Transition Planning: Objectives

- To avoid negative impacts to the business during system transition
- To transition management of system support operations (helpdesk, LCSA support, configuration management, etc.) responsibilities to DCSS
- To migrate system hardware from contracted Data Center to State Data Center
- To transition management of software development and maintenance responsibilities from contractor to DCSS

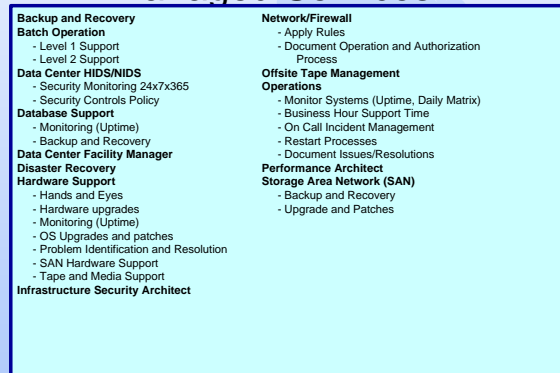


Transition Planning: Transitioned Services

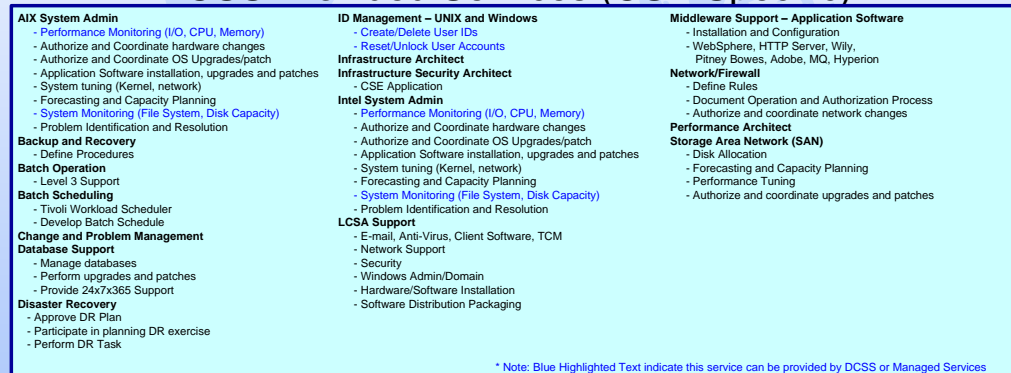
Services Currently Provided by the Business Partner



Managed Services



DCSS Provided Services (CSE Specific)



* Note: Blue Highlighted Text indicate this service can be provided by DCSS or Managed Services



Help Desk: End User Support

- Help Desk Plan (call and incident process)
- Help Desk Integration
- Service Level Management
- Incident Tracking and Management
- Staffing Model





Help Desk: Visual

BP CSE Help Desk

Help Desk – Boulder, CO.

CSE Help Desk Agent
- Level 1 System Support
CSE Help Desk Manager
CSE Help Desk Team Lead
CSE Problem Process Coordinator
CSE Problem Resolver
CSE Problem Resolver Group Leader
Customer Satisfaction Manager
- Surveys
Facility
- 800 Number
- CentreVu
- **ManageNow**
- eESM
- Scripts
- Status Board
- Problem Interface Flow
- Enterprise Systems Management Reporting Technology

Project Office

CSE Help Desk Agent
- Level 2 System Support
- Level 3 System Support
Service Entitlement Failure State Contact
State Liaison



DCSS CSE Help Desk

CSE Help Desk Agent
- Level 1 System Support
- Level 2 System Support
- Level 3 System Support
CSE Help Desk Manager
CSE Help Desk Team Lead
CSE Problem Process Coordinator
CSE Problem Resolver
CSE Problem Resolver Group Leader
Customer Satisfaction Manager
- Surveys
Facility
- 800 Number
- CentreVu
- **ClearQuest (Replacement for ManageNow)**
- eESM
- Scripts
- Status Board
- Problem Interface Flow
- Enterprise Systems Management Reporting Technology
Service Entitlement Failure State Contact
State Liaison

* Note: Red Highlighted Text indicate application will not migrate to DCSS.



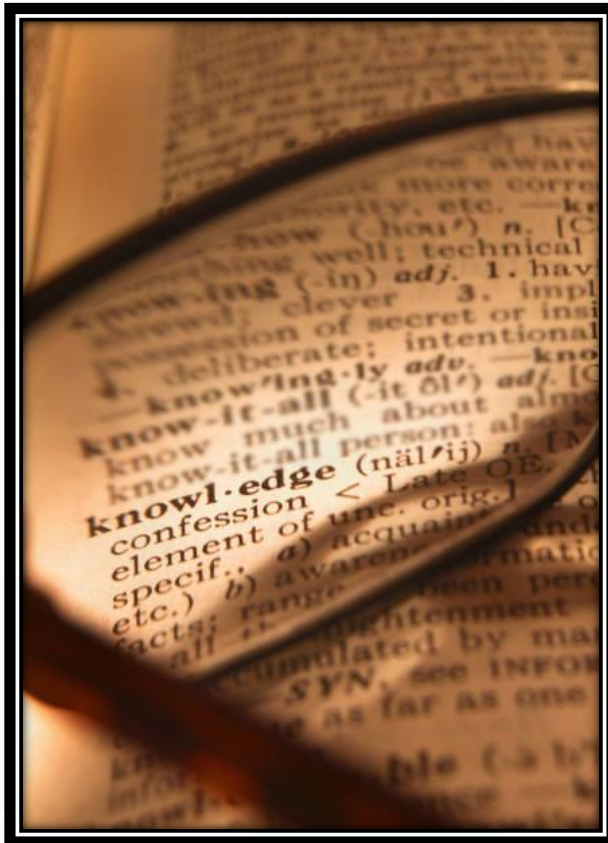
Staff Transitions

- Knowledge Management
- Organizational Change Management
- Class Exercise
- Break





Knowledge Management (KM)



- Definition: Knowledge Management is the process of capturing, distributing, and effectively using knowledge
- 20 year old concept/term
- Has not been mastered, close, but not yet
- Be purposeful in your KM efforts



Knowledge Management (KM)

- Why Start?
- When to Start?
- How to Start?





Knowledge Management (KM)

■ What Format?

- PowerPoint
- One on One Training Program
- Meetings
- Documentation
- Cross Team Training
- Training Guide or Wiki
- Video or Audio Recordings

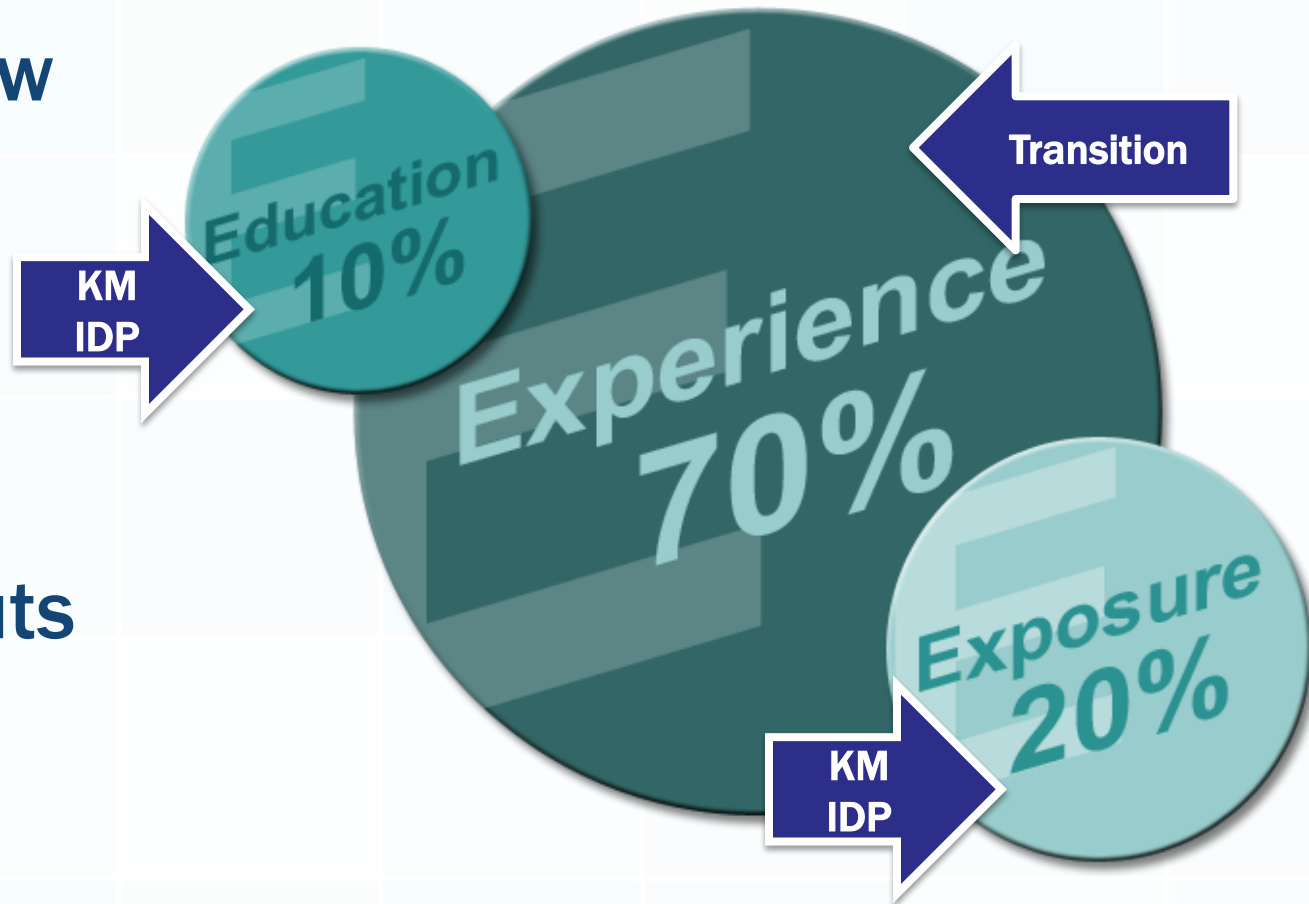


KM in Action – Enterprise Data to Revenue

■ Overview

- Approach
- Roles
- Format

■ Handouts





Organizational Change Management

- OCM is an approach to transitioning an organization, its groups and individuals from their current state to a new state
- It's all about managing the most important part of change...the People!
- Links:
 - <http://www.cio.ca.gov/opd/itla/itla-21.html>
 - http://www.cio.ca.gov/opd/project_academy.html

Technology Transition

What's your
type?



Tip #1: Keep Calm



CCSAS Migration



ECSS (Call Center)



866-901-3212



LCSA Call Center

NCP / CPs



CSE Self Service

LCSAs



LCSA Case Worker (CSE)



Local Batch Print (Hotfolders)

Project Office (Rancho)



Central Scan (Kofax)



DCSS Staff

From: E Business Hosting Center

- CSE (Child Support Enforcement) System
- Tracks 1.5 Million Open Cases
- Serving more than 9 million active case participants.
- 6 Logical Environments
- 7500 Concurrent Users
- 200+ Batch Jobs running 24 X 7
- Over 80 LPARs, p590/690
- 69 AIX / Windows Servers

Third Party



Process Server



County Courts

OTech WAN

External Interfaces / Service Providers



Exchange Partners
Type B



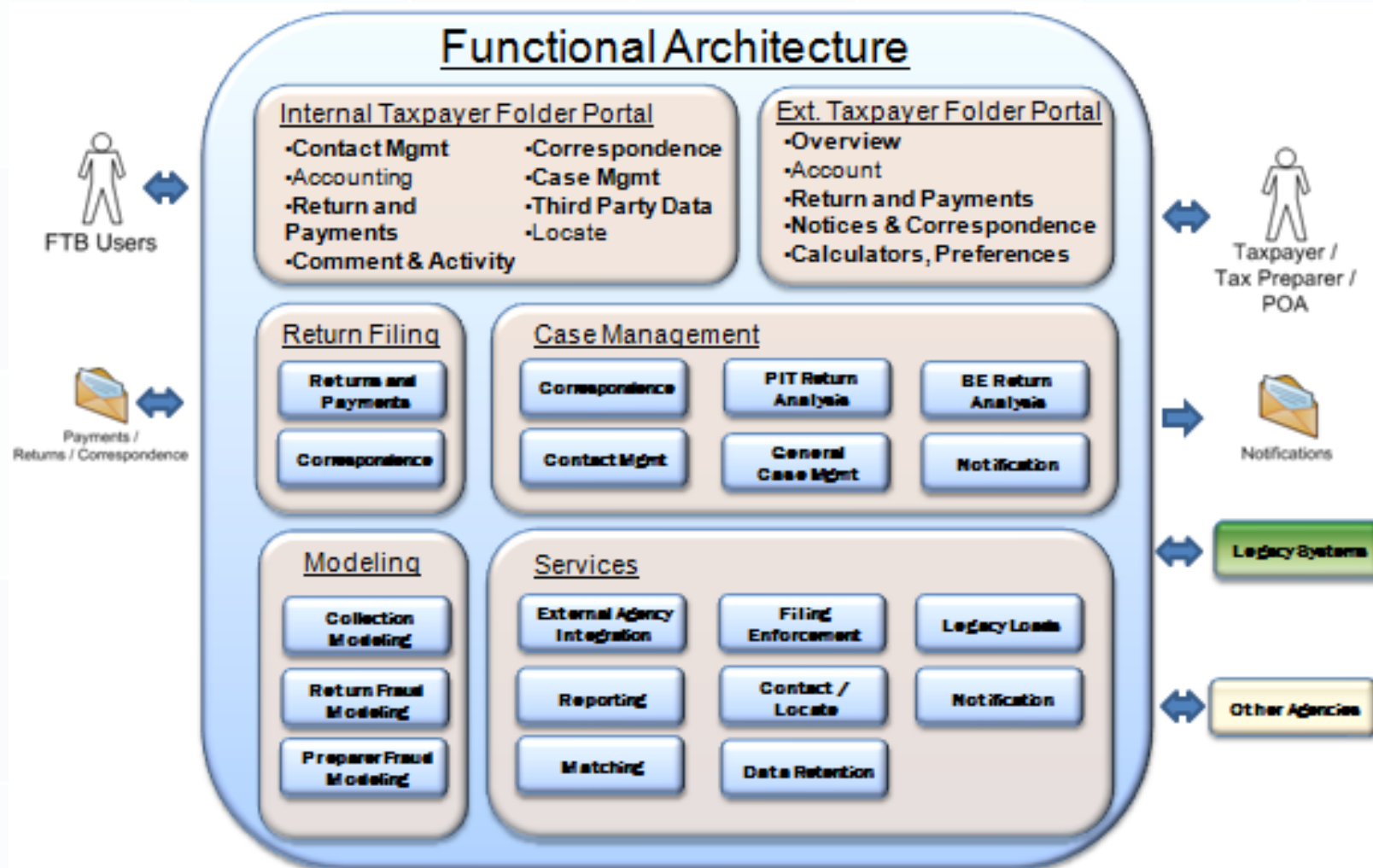
Exchange Partners
Type A

To: OTech (Managed Services)

- Virtualized Environment – 2 Frames
- New Local Area Network
- LPAR Additions to Separate Dev/Test
- Load Balancing Changes
- Storage and Monitoring Enhancements
- Otherwise “Lift and Lay”



EDR Transition





Tip #2: Know Technical Requirements

CCSAS Migration	EDR Transition
✓ Re-Host the System to a State Facility	✓ Inventory, Assess EDR Solution, Roles, Processes and Tools
✓ Plan Future State Organization	✓ Plan Future State Organization
✓ Assume Ownership of Processes	✓ Assume Ownership of Persistent Processes
✓ Implement by End of Contract	✓ Execute Transition Of Ownership of System by End of Warranty Period



Tip #3: Engage Your Teams

CCSAS Migration

✓ Organized into Sub Teams:

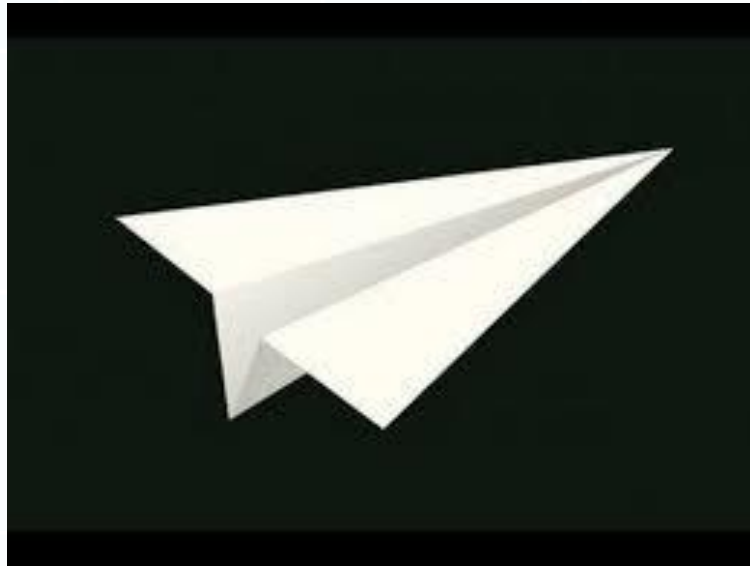
- Hardware
- Software
- Network
- Special Projects

EDR Transition

✓ Organized Leads by Subdivisions and Area:

- Overall PM/Scope
- Tools
- Process
- Solution

Break - Activity





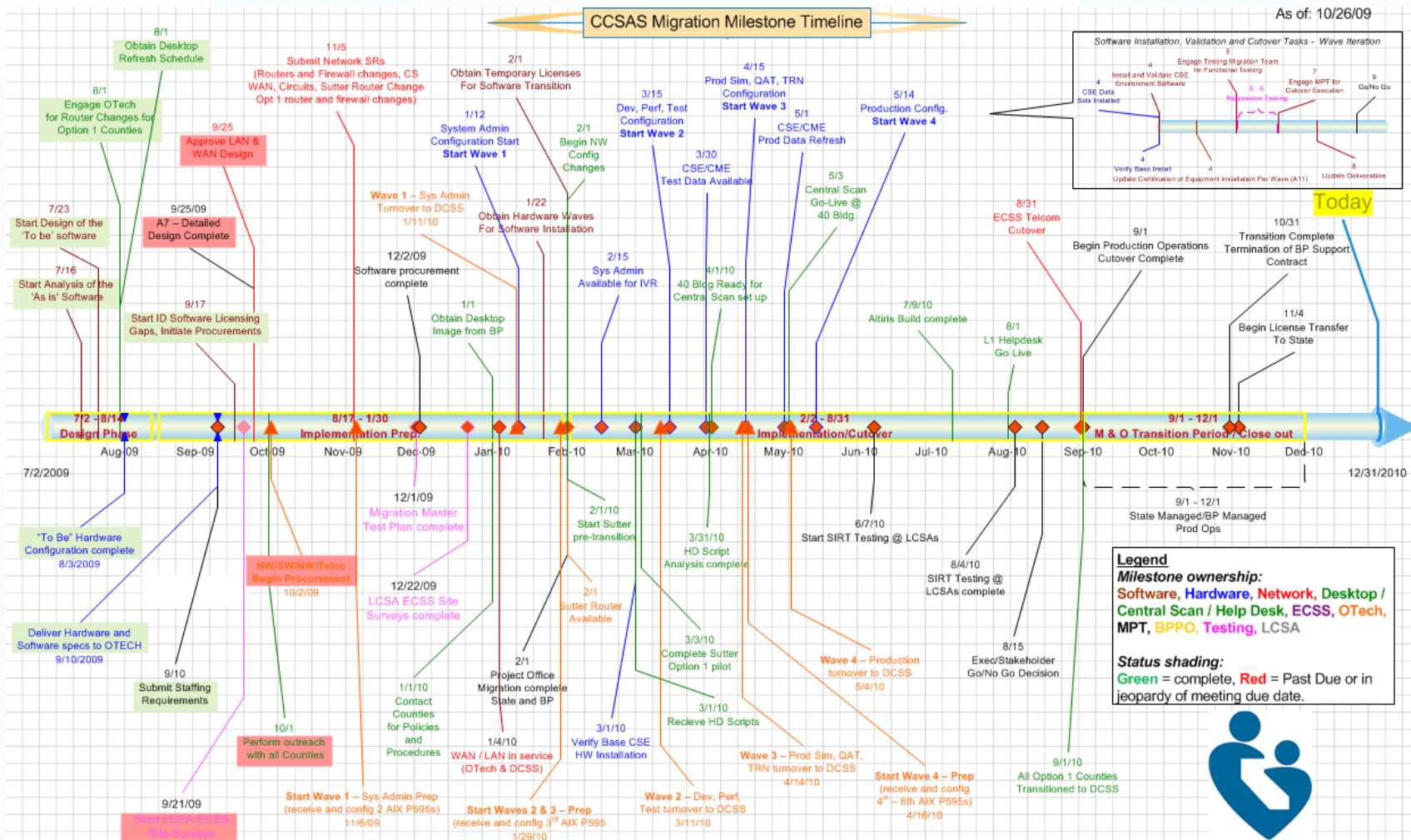
Tip #4: Target Your Communications

- **Communication Plans**
- **Use Your Project Resources**
 - Forums, Newsletters
 - Knowledge Management Program
 - Organizational Change Management Team
 - Vendor Relationships
 - Technical Contacts

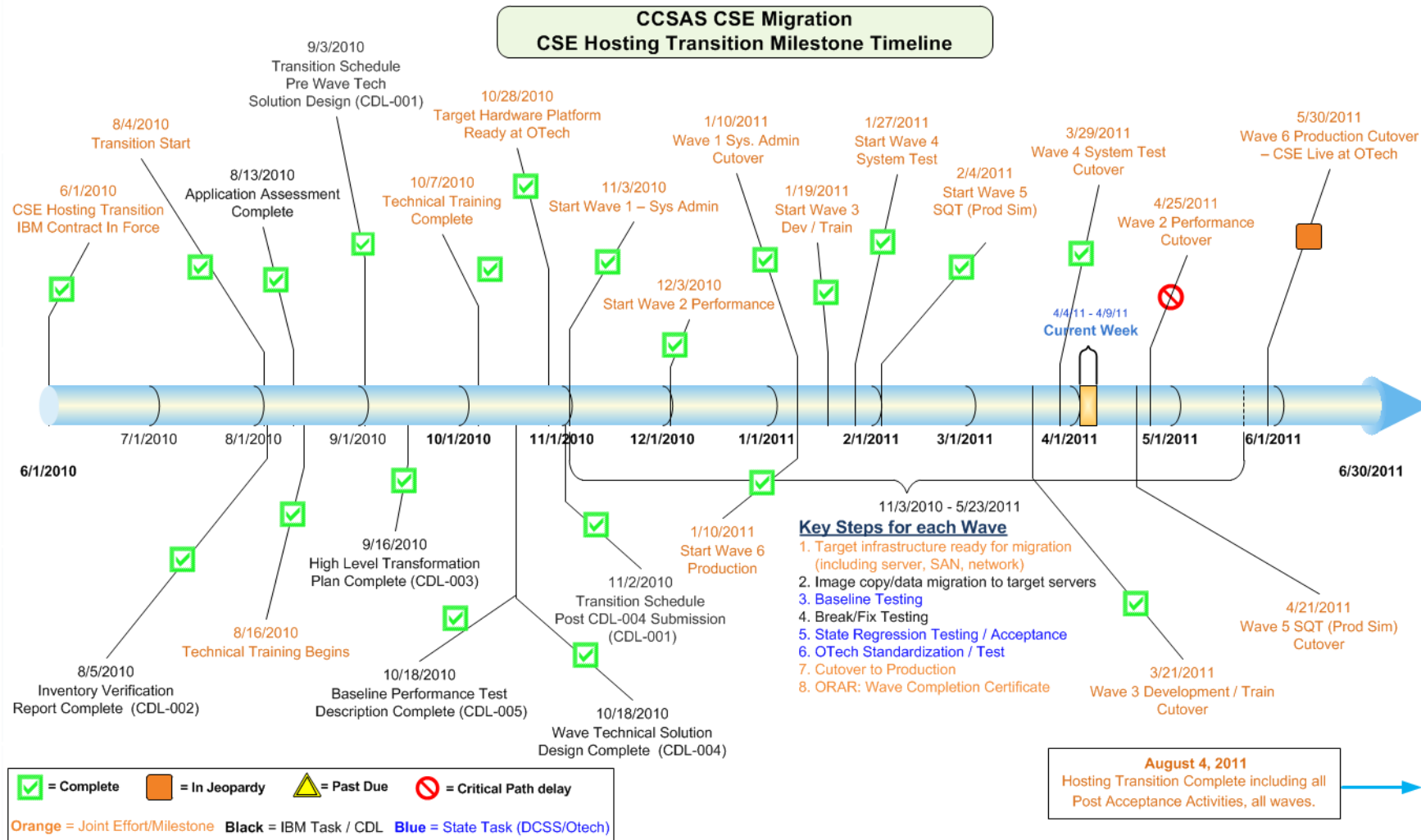


Tip #5: Roadmaps Are Your Friend

Road Map Your Activities w/ Stakeholders



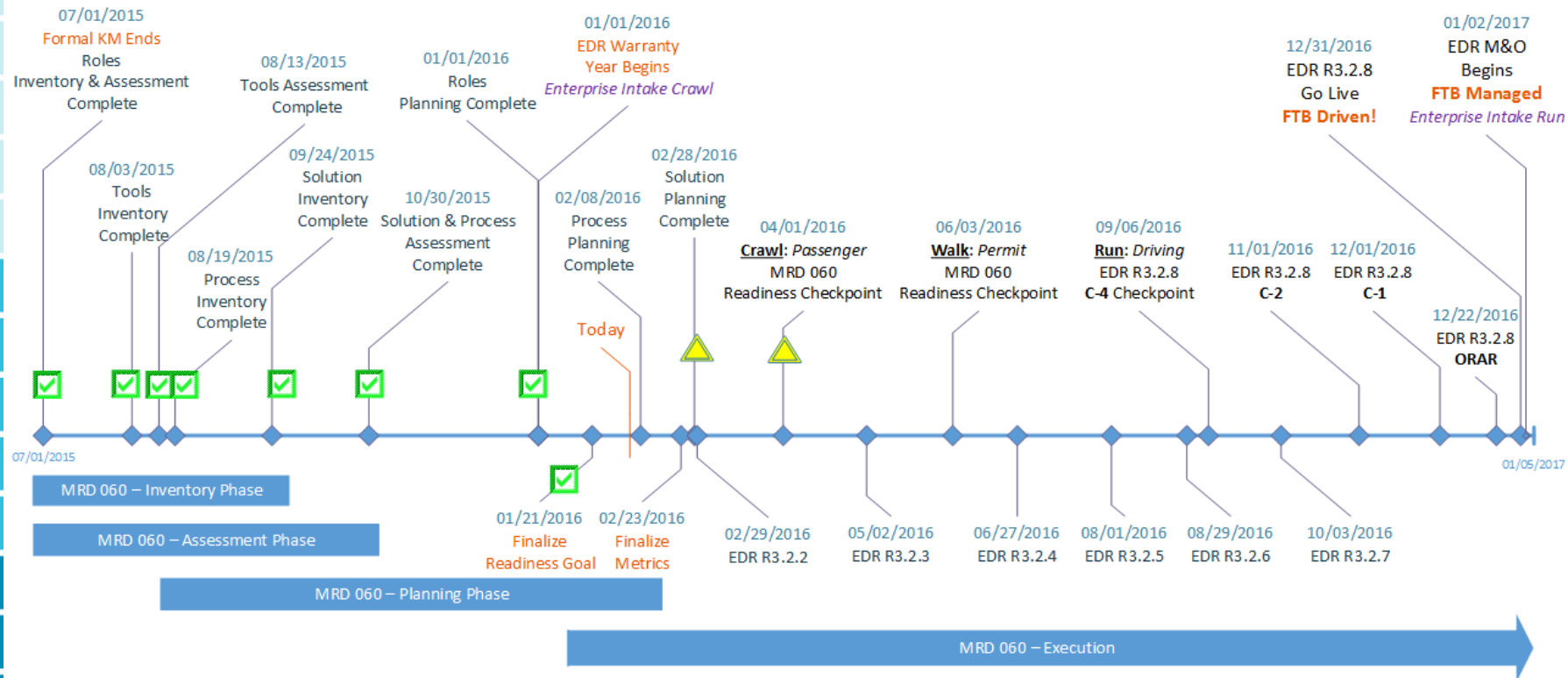
Tip #5: Roadmaps (Cont.)



Tip #5: Roadmaps (Cont.)

EDR System Transition Readiness

MRD 060 – System Transition to the State Milestones



Timeline Legend

- Green checkmark = Complete
- Red square = In Jeopardy, PuTT Issue or Risk
- Yellow triangle = Past Due, PuTT WP, DP
- Red line = Behind Schedule, No Plan, PuTT issue or risk exists
- Yellow line = Behind Schedule, Plan exists, PuTT watch point or decision point exists



Tip #6: Execute Quick Wins

- Executed Quick Wins (CCSAS)
 - Transitioned Project Office Early
 - Transitioned Central Scan Early
 - Transitioned Call Center Early
- Executed Contract with IBM to “Transition Out” of their hosting center for one time efforts

Project Office (Rancho)



Central Scan (Kofax)



DCSS Staff

ECSS (Call Center)



866-901-3212



LCSA Call Center

From: E Business Hosting Center

- CSE (Child Support Enforcement) System
- Tracks 1.5 Million Open Cases
- Serving more than 9 million active case participants.
- 6 Logical Environments
- 7500 Concurrent Users
- 200+ Batch Jobs running 24 X 7
- Over 80 LPARs, p590/690
- 69 AIX / Windows Servers

Tip #6: Execute Quick Wins (Cont.)

■ Executed Quick Wins (EDR):

- Transitioned Design Stage 1 to FTB Sept. 2014
- Utilized State Credit Resources for Skill Sets already in House



Tip #7: Metrics ... Lots of Them!

- CCSAS Migration Dashboards
- EDR Dashboards
- Readiness Measurements

Thresholds Pre CWR and Crawl	
Percentage of Actual to Planned >=	80%
Percentage of Actual to Planned <=	20%
Thresholds Walk, Run, Role Transition, Overall	
Percentage of Actual to Planned >=	90%
Percentage of Actual to Planned <=	60%

Table 1 – SUMMARY ANALYSIS FINDINGS

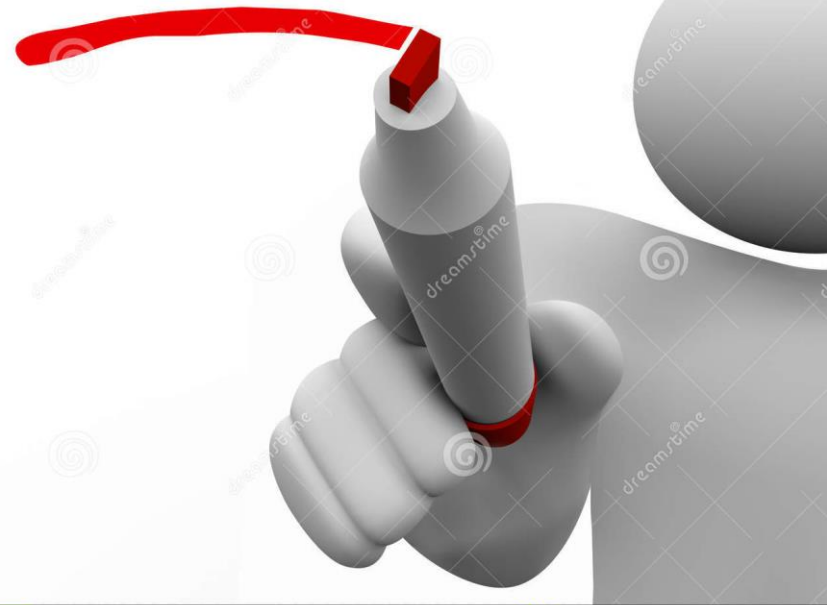
Line	PIRA/ORAR Summary Condition	Roles	Process	Solution	Tools	Transition Work
1.1	Stoplight Status					
1.2	Go Projections/Recommendations	0	0	0	0	0
1.3	No Go Projections/Recommendations	0	0	0	0	0



Tip #8: Manage Technology Risks

- Dashboards
- Sponsorship
- Examples

**MANAGE
YOUR RISK**



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Tip #9: Practice Technology Cutovers

■ CCSAS Migration:

- Production Validation Teams
- Dry Runs
- Establish Expectations Early
- Stay Calm, expect the unexpected
(Small Things)

Tip #10: Learn from Mistakes

**Don't waste
a good mistake...
Learn from it.**

Robert Kiyosaki
InspirationBoost.com



Technology Transition Challenges

Good Idea?



Bad Idea?





Tools and Templates by Type

■ Processes

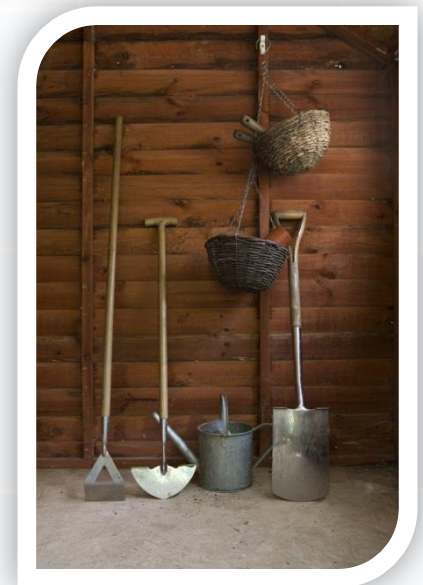
- Business Process Implementation Plans

■ Project Planning:

- Roadmaps
- Sponsor Dashboards

■ Services Planning:

- Migration Visual





Tools and Templates by Type

■ Cutover Planning

- Wave Execution Checkpoints - ORARs
- Wave Kick Off / Entry Criteria Checklists

■ Cutover Validation

- Testing Activities
Timeline Example

■ Knowledge Management

- Tools / Templates

■ Organizational Change Management



Measures for Success

■ Business Process/Operational Transitions

- Have clear objectives and sponsor agreement
- Business processes are well understood for transition in / out
- Services to the business continue uninterrupted





Measures for Success (cont.)

■ Staffing Transitions

- Increase or consistency in staff productivity, product and service quality, and deliverable consistency
- Intellectual and knowledge-based assets have been captured
- Knowledge gaps are minimal
- Created an environment where the people are truly happy, know what to do and how to do it



Measures for Success (cont.)

■ Technology Transitions – Survival Tips





Questions

